November 1988

Presstime

The Journal of the Newspaper Publishers Association

Tumult on Campuses As J-Deans Come and Go

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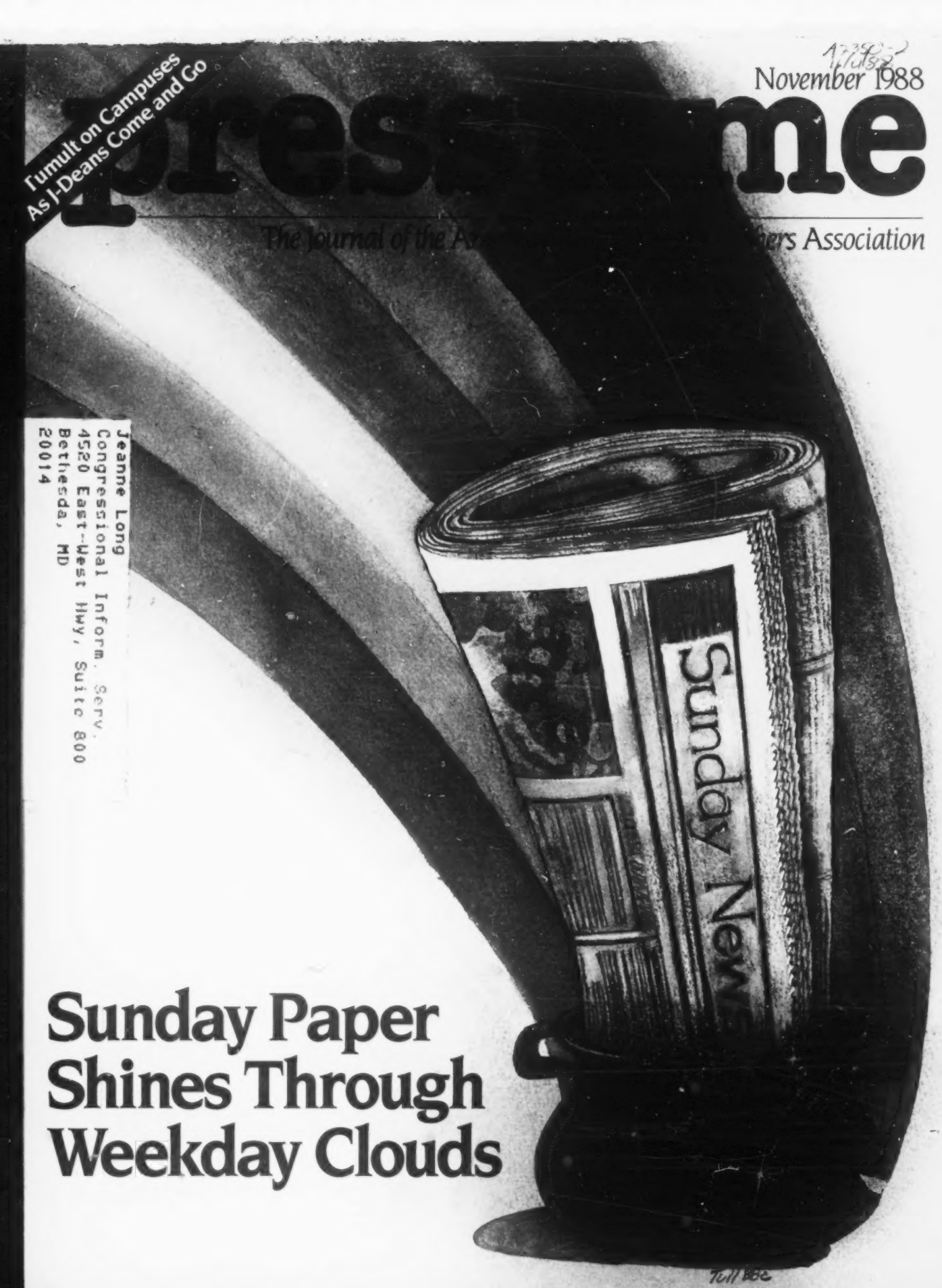

Sunday Paper Shines Through Weekday Clouds

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INDEX VOLUME 10, NUMBER 11 NOVEMBER 1988

Special Report *Amid the lackluster performance of daily newspapers, the Sunday edition glitters. But it is not pure gold. Even though weekday circulation growth has ground almost to a halt, Sunday circulation has continued upward—although at a lesser rate than the increase in population and households. Advertisers are shifting more and more of their business to the Sunday edition, and even demand that some newspapers start Sunday papers. Newspaper executives try to understand the ramifications of Sunday's success story, but answers don't come easily.* **28**

Wanted: J-school deans *Benefits include prestige, influence, challenge. Must tolerate headaches. Inquire at 10 percent of U.S. journalism schools.* **6**

On the press freedom battlefront *Seven organizations rally to the cause wherever a free press comes under attack in the world.* **12**

Naughty Neighbors *News organizations in the Americas often are under fire from governments, despite a few encouraging developments.* **16**

Rack and ruin *Newsracks are favorite targets for vandals, costing local newspapers up to $100,000 a year to repair.* **18**

Ink Disposal *Vendors are developing ink recycling systems that will pay for themselves while helping newspapers to be good environmental citizens.* **24**

Paring the rank-and-file *Technology has phased thousands of newspaper jobs out of existence. Pagination is bringing another, smaller wave of attrition.* **36**

Profile: Susan Miller *Scripps Howard's editorial director overcame obstacles to break into newspapering. Now she helps newspapers overcome theirs.* **40**

Essay: Fraud prevention *Newspapers can help curb fraudulent advertising by taking preventive steps, says Lawrence F. Murphy of The New York Times.* **42**

Waste not, tax not *State governments are getting the newspaper industry's attention with taxation schemes to promote recycling.* **48**

Tale of two cities *Dailies in small California and Ohio communities have discovered how to stay successful, despite their diverse and changing markets.* **60**

Preprint predicament *If newspapers cannot enlarge and modernize their mailrooms, insert advertisers say they'll take their business elsewhere.* **70**

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CHAIRMAN'S CORNER

ANPA adjusts 1989 program to focus on members' priorities

ANPA's officers, directors and staff are currently planning your Association's programs and budget for 1989. They are drawing heavily on the advice and guidance expressed by newspaper executives from across North America who responded to this spring's membership survey. The task is formidable because of the many useful suggestions received from the nearly 2,300 executives—representing all newspaper departments—who responded.

A quick review would highlight the following: You told us ANPA has improved its service to you and continues to improve. Members noted that we were generally on the right track, with a good staff and efficient operation. You reiterated that ANPA should help on short-term problems, while at the same time giving major attention to the longer-range needs and challenges facing our business.

Arthur Ochs Sulzberger

Members were particularly pleased by presstime, which was started a decade ago when our last membership survey indicated a major communication gap.

What happens now and how does ANPA listen to and act on your views and priorities? Here are some examples:

Executives throughout our survey rated circulation, readership, penetration and editorial-excellence matters as top priority. Therefore, we will be retargeting ANPA programs and staff resources to provide additional help on these vital concerns.

You told us of your growing concern about literacy, and the lack thereof, so we will be adding further ANPA resources to the ongoing ANPA Foundation work on this.

Meanwhile, of course, we noted your continued concern about competition from other media, operating costs, new production methods, human resources and, regulation from federal, state and local governments.

I can assure you that ANPA will continue, as it has in the past, to monitor, inform and, where necessary, take the lead in representing America's newspapers in the marketplace.

We are a diverse industry, each in our own way serving our readers and advertisers. What the survey shows is that through our membership in ANPA and under its umbrella, we are stronger in our unity than each standing alone. And this is good for a free press and a free society.

Thank you for your help.

Arthur Ochs Sulzberger
ANPA Chairman

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Consumption decline reaches 6 months

Newsprint consumption by U.S. daily newspapers decreased 3.2 percent in September, the sixth straight month of declining consumption compared with year-earlier months. For the first nine months of the year, consumption by U.S. dailies was down 0.04 percent.

Consumption by all U.S. users totaled 1,021,721 metric tons in September, a decrease of 2.7 percent from September 1987. However, there was a 0.4-percent increase for the nine-month period.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a 46-day supply in September, up from 42 days a year earlier.

September's shipments from Canadian mills were 1.2-percent higher than in September 1987. Canadian shipments to the United States increased 0.6 percent, and those overseas were up 0.5 percent.

Canadian mills operated at 96 percent of rated capacity in September and 99 percent year-to-date. Figures for U.S. mills were 98.2 and 97.9 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

Region	August 1988(r)	August 1987	% Change
Northeast	185,395	196,589	-5.7
North Central	160,233	164,020	-2.3
South	232,736	237,176	-1.9
West	161,971	173,634	-6.7
Circulation Size			
up to 25,000	58,976	60,290	-2.2
25,001-100,000	162,863	162,384	+0.3
Over 100,000	518,496	548,745	-5.5
August totals	740,335	771,419	-4.0
Eight-month totals	6,066,680	6,044,760	+0.4
Region	**September 1988(p)**	**September 1987**	**% Change**
Northeast	188,054	197,142	-4.6
North Central	162,143	166,708	-2.7
South	237,346	237,313	+0.01
West	164,881	175,894	-6.3
Circulation Size			
up to 25,000	58,520	61,141	-4.3
25,001-100,000	165,205	161,504	+2.3
Over 100,000	528,699	554,412	-4.6
September totals	752,424	777,057	-3.2
Nine-month totals	6,819,104	6,821,817	-0.04

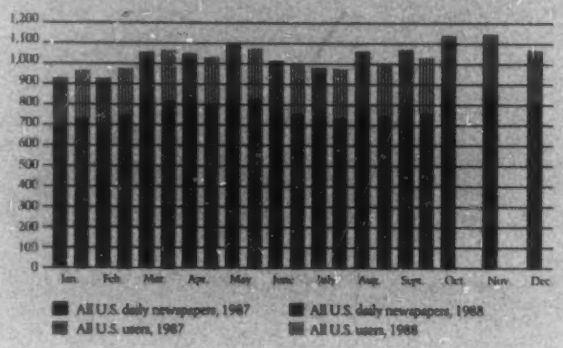
Estimated consumption of all U.S. users

	1988	1987	% Change
July totals	967,960(r)	967,075	+0.1(r)
August totals	999,681(r)	1,040,896	-4.0(r)
September totals	1,021,721(p)	1,050,338	-2.7(p)
Nine-month totals	9,049,101(p)	9,009,532	+0.4(p)

Production

	Canada	U.S.A.	North America
September 1988	789,600	446,260	1,235,860
September 1987	796,750	448,187	1,244,937
Decrease	-7,150	-1,927	-9,077
	-0.9%	-0.4%	-0.7%
Nine months 1988	7,457,742	4,054,580	11,512,322
Nine months 1987	7,250,839	3,948,348	11,199,187
Increase	+206,903	+106,232	+313,135
	+2.9%	+2.7%	+2.8%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
July 1988	972,566	45	6
July 1987	931,330	39	6
August 1988	1,006,598	44(r)	5
August 1987	904,565	37	6
September 1988	1,005,930	41(p)	5(p)
September 1987	929,084	36	6
Canadian mills			
September 1988	301,322	—	—
September 1987	270,795	—	—
U.S. mills			
September 1988	66,577	—	—
September 1987	42,476	—	—

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
September 1988	609,684	102,408	117,893	829,985
September 1987	631,262	102,630	118,177	852,069
Nine months 1988	5,305,673	908,295	1,131,547	7,345,515
Nine months 1987	5,273,382	857,719	1,126,147	7,257,248
Increase	+32,291	+50,576	+5,400	+88,267
	+0.6%	+5.9%	+0.5%	+1.2%
From U.S. mills				
September 1988	411,266		35,555	446,821
September 1987	434,618		16,684	451,302
Nine months 1988	3,761,357		262,777	4,024,134
Nine months 1987	3,735,346		219,600	3,954,946
Increase	+26,011		+43,177	+69,188
	+0.7%		+19.7%	+1.7%
From North American mills				
September 1988	1,020,950	102,408	153,448	1,276,806
September 1987	1,065,880	102,630	134,861	1,303,371
Nine months 1988	9,067,030	908,295	1,394,324	11,369,649
Nine months 1987	9,008,728	857,719	1,345,747	11,212,194
Increase	+58,302	+50,576	+48,577	+157,455
	+0.6%	+5.9%	+3.6%	+1.4%

[1]Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2]Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

NOTE

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